
















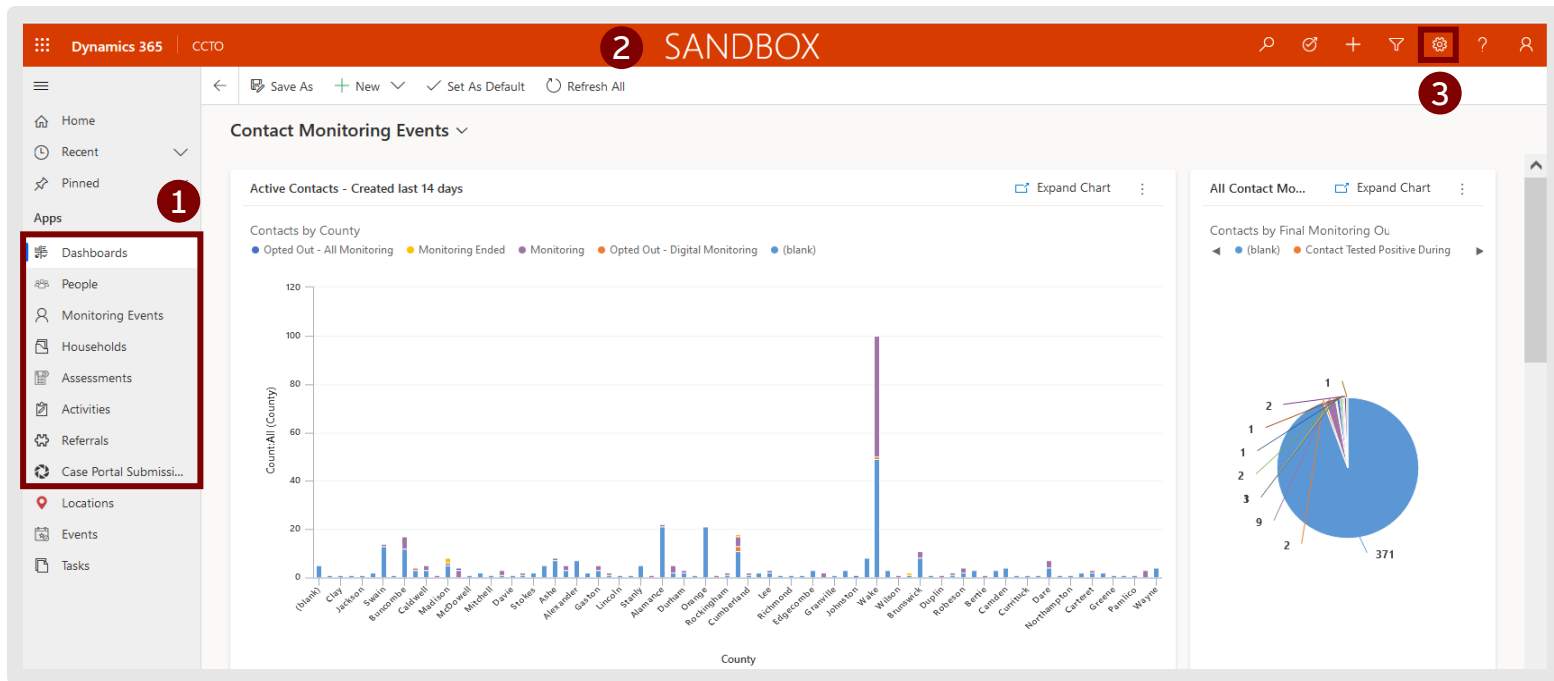
# CCTO Glossary

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- 1. Navigation Tabs:** List of tabs for each type of record within CCTO.
  - **Dashboards Tab:** Displays charts and graphs about contacts & assessments within the system.
  - **People Tab:** Displays a list of [person records](#) in the system.
  - **Monitoring Events Tab:** Displays a [list of monitoring events](#) (MEs) in the system and allows users to enter new monitoring events.
  - **Households Tab:** Displays a list of [households](#) in the system and allows users to enter new households.
  - **Assessments Tab:** Displays a list of [assessments](#) for individuals in the system.
  - **Activities Tab:** Displays a list of [activities](#) (which could include phone calls, tasks, text messages, or emails) for individuals in the system.
  - **Referrals Tab:** Displays a list of [referrals](#) for individuals in the system.
  - **Case Portal Submissions Tab:** Displays a list of [contact submissions made by case patients via the portal](#) per the [job aid](#).
- 2. Sandbox Banner:** Displayed at the top of the screen to confirm you are in the practice, or Sandbox, system and can enter practice information. *The live, or production, system is for real contact and case patient information only and will not display this banner.*
- 3. Settings Gear:** Contains a dropdown menu with *Personalization Settings* (where users can change time zone and other default settings) and *Advanced Settings*, an area for administrators only.



# Monitoring Events Tab

The **Monitoring Events Tab** holds all **the monitoring events** (records on which contact or case monitoring takes place) within CCTO, and it should be your center of operations for reviewing any individuals you are monitoring.

- My Active Monitoring Events (Contact & Case) View:** System [view](#) that displays all of the active contact and case [monitoring events](#) (MEs) assigned to the current user. Can be changed to show various other lists of MEs.
- Columns:** Categories of information about each monitoring event that can be sorted or filtered by clicking each caret (down arrow). These columns can be changed and customized by creating a custom view [per the job aid](#).
- Deactivate Button:** Appears upon selecting monitoring event(s). Deactivates (but does *not* delete) the selected monitoring event. This will put this monitoring event into an inactive status, removing the ME from the user's "My Active Contacts and Cases" view. An ME should be deactivated after a monitoring period has ended.
- Assign Button:** Appears upon selecting monitoring event(s). Changes the owner of an ME to a different user or team. This will remove the ME from the first user's "My Active Monitoring Events" view and place it in a different user's "My Active Monitoring Events" view.



The screenshot displays the CCTO interface with a sidebar menu on the left and a data table on the right. The sidebar menu includes a 'Views' dropdown (1) which is expanded to show 'My Views' (2), 'System Views' (3), and a list of views including '1-All Monitoring Events (Contact & Case)' (4) and 'All Inactive Monitoring Events (Contact & Case)' (5). The top right of the interface features a 'Create view' button (6) and a search bar (7) with a filter icon (8). The data table on the right shows columns for Household, Household note, Primary Phone, Monitoring, Preferred language, Priority, Preferred action, Is Minor, Is Student, School Name, and Owner. The table contains several rows of data, including one for 'Example Household Note' and others for various contacts and cases.

A **view**, such as the “My Active Monitoring Events” view, is a way of looking at the set of data displayed within **each tab**. Views use **filters** to limit the entries displayed and **columns** to change the information displayed about those entries. Views can be developed or shared by others, and you can also develop and save your own views per the [job aid](#) and the [training](#).

1. **Views Dropdown:** Displays a list of all views available to the current user. **Views** are options within a tab that change the way information is filtered or displayed. A view may add or remove filters on data (such as a filter for a record’s owner or county) or change the type or order of [columns](#) displayed.
2. **My Views:** A list of views created by the user (“personal views”) or shared with the user by other users of CCTO.
3. **System Views:** A list of default views automatically available to all users of CCTO.
4. **All Monitoring Events (Contact & Case):** A system view that displays a list of all active/inactive monitoring events for all contacts and cases.
5. **All Inactive Monitoring Events (Contact & Case):** A system view that displays a list of only inactive monitoring events for all contacts and cases.
6. **Create View Button:** Opens a system dialogue that allows the user to create and share personal views [per the job aid](#).

7. **Filter Icon:** Opens a panel that displays all filters applied to the current view and allows users to add or remove filters.
8. **Search:** Used to search within the current view by contact name, C#, address, etc.



# Contact Monitoring Events

Barbara Roberts  
Monitoring Event · MDA Form

Monitoring Event | Assessments | All Activities | Referrals | System Information | Related

**1** Record Information

C# C-0000994526

Contact or Case Patient **Contact**

Person **Barbara Roberts**

**2** Basic Info

Priority Contact or Case ☐ No

First Name **Barbara**

Middle Name ---

Last Name **Roberts**

Preferred Name **Barbie**

Date of Birth (DOB) 1/1/2000

Fake DOB ☐ No

Is Minor ☐ No

Household **Roberts Dream House**

Household Relationship **Guardian**

Requires Proxy ☐ No

**3** Monitoring Details

Enable Digital Monitoring **Yes**

Monitoring Status **Monitoring**

Monitoring End Date 9/22/2021

Final Monitoring Outcome ---

Symptom Onset Date ---

Last Assessment Date 9/8/2021 12:27 PM

First Date Symptoms Reported ---

Most Recent Date Resource Need Reported ---

Source Case Information

Ongoing Exposure ☐ No

NC-COVID Event ID of Source Patient #1 (Use the number) **101444343**

Last Date of Exposure to Source Patient #1 9/7/2021

NC-COVID Event ID of Source Patient #2 (Use the number) ---

Last Date of Exposure to Source Patient #2 ---

Source Patient Name ---

**4** Monitoring Event Notes

Contact prefers to speak in the morning due to online school schedule in the evenings.

Household note from NC COVID  
Example Household Note

**5** Timeline / Activities

Timeline

Search timeline

Enter a note...

Task completed by Mary Moran  
Follow-up - Elevate  
Example follow-up note for elevation to supervisor  
Closed 9/8/2021 12:30 PM

Note modified by Mary Moran  
Chronic Condition ABC  
Example note of contact's chronic condition here.  
9/8/2021 12:30 PM

Phone Call from Mary Moran  
Initial Outreach / Answered  
Spoke to Barbie and advised on quarantine, discussed concerns regarding...  
Closed 9/8/2021 12:28 PM

Each contact **monitoring event (ME)** is associated with a **person record** and represents a **unique, continuous monitoring period** following exposure to COVID-19, which may include exposure to more than one case patient and/or extend beyond the duration of an initial quarantine period. When a contact concludes a monitoring period, their ME is closed and deactivated. Review the [materials](#) for detailed instructions on creating MEs, and see the [Person Functionality Job Aid](#) for more information on how MEs are related to person records.

## 1. Record Information:

- **C#:** A unique identifier for this monitoring event that is automatically generated by the system.
- **Contact or Case Patient:** Indicates if the individual is *entering* the system as a contact or as a case patient. This field is mandatory and locks on the first time that a monitoring event is saved (per the [Case Patients Job Aid](#)). *This glossary section covers MEs set to "Contact."* For special fields that are only visible when "Case Patient" is selected, see [Case Patient MEs](#).
- **Person:** Person record associated with this ME. *If you are creating a new ME, see [the job aid](#) for details on using this field and functionality.*

## 2. **Basic Info:**

- **Priority Contact or Case:** This feature allows an individual to be tagged as a high priority for manual outreach. Check with local guidance to determine if this toggle should be used.
- **First Name:** First name of the contact. Required to create monitoring event.
- **Middle Name:** Middle name of the contact. Not required.
- **Last Name:** Last name of the contact. Required to create monitoring event.
- **Preferred Name:** Contact's preferred name. Not required.
- **Date of Birth:** Contact's exact date of birth, if known. Required in order to select "Yes" in the "Begin Monitoring?" field, which triggers digital outreach.
- **Fake DOB:** Indicates if contact's DOB is a placeholder. If this is turned on and saved, "Calculated Age" will not be populated.
- **Is Minor:** Indicates if contact is under age 18.
- **Household:** Used to link a contact with an existing [household](#).
- **Household Relationship:** Used to indicate a contact's relationship to others in their household.
- **Requires Proxy:** Indicates whether a contact completes their own assessments or requires a proxy (e.g., parent completing assessment for minor under 13).

## 3. **Monitoring Details:** Used after contact entry when monitoring begins.

- **Enable Digital Monitoring:** Turns on automatic digital (text or email) outreach when set to "Yes" as long as other required fields are complete. Review the [job aid](#) for details.
- **Monitoring Status:** Indicates if contact is being monitored, has opted out, or has concluded or paused monitoring.
- **Monitoring End Date:** Automatically calculated as 10 days since a contact's last date of exposure unless manually updated by tracer. Determines end of digital monitoring but does NOT impact the date sent to contact in automatic digital exposure notification.
- **Final Monitoring Outcome:** Indicates a contact's status at the conclusion of monitoring. See the Closing Out a Contact [job aid](#) for an explanation of outcomes and when they are used.
- **Symptom Onset Date:** Manual field to indicate first date individual experienced symptoms.
- **Reported No Symptoms:** Manual field to indicate if individual reported no symptoms. Updates automatically for case patients submitting this information through the portal.
- **Last Assessment Date:** Locked field that automatically calculates the date of the last submitted [assessment](#) in which the "Agreement" field was completed.
- **First Date Symptoms Reported:** Locked field that updates to alert tracer to review assessment on the first occasion that a contact [reports a symptom](#). Only updates one time.



- **Most Recent Date Resource Need Reported:** Locked field that updates to alert tracer to review the assessment each time contact [reports a new resource need](#).
4. **Monitoring Event Notes:** Free text box for any reference information that should remain easily visible at the top of a contact's monitoring event.
- **Household Notes:** Locked field that automatically flows into CCTO with information entered into its counterpart field in NC COVID. Used to detail a contact's household information. Only appears if populated.
5. **Timeline/Activities:** Used to schedule and record monitoring, outreach, and reference information [per the job aid](#).
- **Task:** Item that logs or schedules all other monitoring activities, such as the review of digital assessments or planned escalations.
  - **Note:** Item that records reference information, such as chronic conditions. Key information entered in this field can also be pasted into the *Monitoring Event Notes* box for increased visibility as needed.
  - **Phone Call:** Item that logs or schedules attempted or completed phone calls.

BR
Barbara Roberts
Monitoring Event - MDA Form

Monitoring Event
Assessments
All Activities
Referrals
System Information
Related

Date of Birth (DOB)
1/1/2000

Fake DOB
No

Is Minor
No

Household
Roberts Dream House

Household Relationship
Guardian

Requires Proxy
No

Contact Information

U.S. Primary Phone  
(will be used for text messages)
1-555-444-5454

U.S. Phone #2
1-\_\_-\_\_-\_\_

Country Code
---

Phone #3
---

Email
barbie@dreamhouse.com

Preferred Method of Contact
Phone Call

Preferred language
English

Source Case Information

Ongoing Exposure
No

NC-COVID Event ID of Source Patient #1  
(Use the number)
101444343

Last Date of Exposure to Source Patient #1
9/7/2021

NC-COVID Event ID of Source Patient #2  
(Use the number)

Last Date of Exposure to Source Patient #2

Source Patient Name

Source Patient Birthdate

Testing Details

Referred to Test?
Yes

Referred to Test Date
9/8/2021

Tested?
Yes

Test Date
9/13/2021

COVID-19 Test Result
Negative

Add Additional Test?

Example note of contact's chronic condition here.
9/8/2021 12:30 PM

Phone Call from Mary Moran  
Initial Outreach / Answered  
Spoke to Barbie and advised on quarantine, discussed concerns regar...  
Closed
9/8/2021 12:28 PM

## 6. Contact Information:

- **U.S. Primary Phone:** Contact's primary phone number, which should be their mobile phone, if available. Automated texts will always be sent to this number.
- **Phone #2, #3:** Contact's secondary phone numbers, such as work or landlines.
- **Country Code:** Indicates if contact has a non-US country code to be applied to Phone #3. Not usually needed.



- **Email:** Contact's email address.
- **Preferred Method of Contact:** Determines how contact will be reached or how automatic digital outreach will be sent. This will be set to "Phone Call" by default until manually changed, and must read "Text Message" or "Email" in order to enable digital monitoring and send a digital [assessment](#).
- **Preferred Language:** Contact's primary language. Determines if automatic outreach is sent in English or Spanish.
- **Other Preferred Language:** Used to type the name of contact's primary language only if "Other" is selected in "Preferred Language." Appears if "Other" is selected in Preferred Language.

7. **Source Case Information:** Section appears only if "Contact" is selected in "Contact or Case Patient."

- **Ongoing Exposure:** Indicates if a contact's last date of exposure is ongoing (e.g., if contact lives with case patient).
- **NC-COVID Event ID of Source Patient #1:** 9-digit NC-COVID Event ID of case patient to whom contact was exposed. This number must start with a "1."
- **Last Date of Exposure to Source Patient #1:** Last date when contact was exposed to case patient. Used by the system to calculate "[Monitoring End Date](#)" and the [recommended testing and quarantine dates](#) sent to the contact in an automatic digital exposure notification. Required to save any monitoring event in which Contact or Case Patient is set to "Contact."
- **NC-COVID Event ID of Source Patient #2:** Used if contact has a new exposure while being monitored.
- **Last Date of Exposure to Source Patient #2:** Used if contact has a new exposure while being monitored.
- **Source Patient Name:** Used only if NC-COVID Event ID is unavailable.
- **Source Patient Birthdate:** Used only if NC-COVID Event ID is unavailable.

7. **Testing Details:** Section appears only if "Contact" is selected in "Contact or Case Patient." Filled out manually by the contact tracer (see [Contact Reported Testing Details](#) for contact-submitted info).

- **Referred to Test?:** Indicates if contact has been referred to testing.
- **Referred to Test Date:** Manual field to indicate date of contact's test referral.
- **Tested?:** Indicates if contact is confirmed to have been tested.
- **Test Date:** Manual field to indicate date of contact's test.
- **COVID-19 Test Result:** Indicates outcome of contact's test.
- **Add Additional Test?:** Manual field that, if checked, produces another box called *Testing Details (Additional Test)* that contains fields for information about a second COVID-19 test for this individual.

Address

Address Line 1123 Dream House Lane

Address Line 2---

CityDuck

State\*NC - North Carolina

Postal Code27949

County\*☑ Dare

Personal Info

Job Title---

Employer---

School Student or Staff?Student

County of Institution☑ Alamance

Institution Name☑ Test 2

Institution Search Instructions

Search by typing the first letters of the name, or by searching any word in the name using a \* before and/or after as a wildcard. Example: Type "\*West\*" to search for "Swain County West Elementary"

Other Institution☐

School Name (Legacy)---

Contact Reported Testing

Test Date9/7/2021

Test LocationMain St. Pharmacy

Test ResultsNegative

Vaccination

Vaccine - 1st DosePfizer-BioNTech (195 MDV) COVID-19 Vac

Vaccine Date - 1st Dose3/4/2021

Approximate Date☐

Vaccine - 1st Dose Confirmed in CVMS?☒ Yes

Vaccine - 2nd DosePfizer-BioNTech (195 MDV) COVID-19 Vac

Vaccine Date - 2nd Dose3/25/2021

Approximate Date☐

Vaccine - 2nd Dose Confirmed in CVMS?☒ Yes

Add Additional Vaccine Dose?☐

Vaccine Communication PreferenceDo not contact in future about vaccines

Last Date Vaccine Referral Made9/8/2021

Text Communication Info

Send Notification☒ Yes

## 9. Address:

- **Address Line 1, 2:** Contact's street address.
- **City:** City of contact.
- **State:** State of contact. Required to create monitoring event.
- **Postal Code:** Postal code of contact.
- **County:** County of contact. Required to create monitoring event if the contact resides in NC. *Use county of case if county of contact is not known.*

## 10. Personal Info:

- **Job Title:** Contact's job title.
- **Employer:** Contact's employer. Do not use for school information.
- **School Student or Staff?:** Indicates if this individual is associated with an educational institution as either a student or staff. If set to either option, new fields for "County of Institution," "Institution Name," and "Institution Search Instructions" will appear.
- **County of Institution:** Indicates the NC county of the institution and limits the options in "Institution Name" to only the county in question if selected.
- **Institution Name:** Searchable field providing a preset list of institutions. If a county is selected in "County of Institution," this field displays only institutions found within this county.

- **Institution Search Instructions:** Provides guidance on how to search for an institution. See [job aid](#) p.2 for details on searching techniques.
- **Other Institution:** Used to enter an institution's name manually if an institution does not exist within the "Institution Name" dropdown. Produces field for "Institution Name (Other)."
- **School Name (Legacy):** Locked field used to display any free text previously entered in the retired "School Name" field (now replaced with "Institution Name") for reference.

**11. Contact Reported Testing:** Section appears only if the contact completes this information in an [assessment](#). Contains locked fields that automatically populate with information provided by the contact.

- **Test Date:** Contact-reported date of testing.
- **Test Location:** Contact-reported location of testing.
- **Test Results:** Contact-reported results of the test.

### **13. Vaccination:**

- **Vaccine - 1<sup>st</sup> Dose, 2<sup>nd</sup> Dose:** Manual field that indicates which classification of vaccine was administered to the contact for their first and second dose.
- **Vaccine Date - 1<sup>st</sup> Dose, 2<sup>nd</sup> Dose:** Manual field for the date when the first dose of the vaccine was administered to the contact.
- **Approximate Date:** Indicates if the date provided for a first, second, or third vaccine dose is approximate.
- **Vaccine - 1<sup>st</sup> Dose, 2<sup>nd</sup> Dose Confirmed in CVMS?:** Toggle indicating whether the information entered in "Vaccine Type" and "Vaccine Date" 1<sup>st</sup> Dose fields has been cross-checked with CVMS per local protocol.
- **Add Additional Vaccine Dose:** Manual field that produces four fields (per the above) for a 3<sup>rd</sup> vaccine dose if checked.
- **Vaccine Communication Preference:** Automatically updates each time a [vaccine referral with a new preference is logged](#) and can also be updated manually.
- **Last Date Vaccine Referral Made:** Locked field indicating the last time a referral with "Vaccine" type selected was logged on this ME.

**SJ Sally Jackson** - Unsaved  
Monitoring Event - MDA Form

**Monitoring Event** Assessments All Activities Referrals System Information Related

Is Student ☐ No

**13**

**Demographic Info**

Gender	Female
Race	Prefer not to answer
Ethnicity	Prefer not to answer
Calculated Age at time of event	21
Manual Age (if DOB is not available)	---

Add Additional Vaccine Dose? ☐

Vaccine Communication Preference ---

Last Date Vaccine Referral Made ---

**14**

**Text Communication Info**

Send Notification ☐ Yes

Most Recent Text Notification Status delivered

Most Recent Notification Status Date 11/23/2021 8:22 AM

Send Vaccine or mAb Communication ---

Most Recent Vaccine or mAb Communication Text Status delivered

Most Recent Vaccine or mAb Communication Status Date 11/23/2021 10:44 AM

### 13. Demographic Info:

- **Gender:** Contact's gender.
- **Race:** Contact's race.
- **Ethnicity:** Contact's ethnicity.
- **Calculated Age at time of event:** Locked field that automatically calculates contact's age based on "Date of Birth." Stops updating when event is closed.
- **Manual Age:** Manual field to input contact's age if DOB is not available.

### 14. Text Communication Info:

- **Send Notification?:** Locked, automatic toggle that moves to "Yes" once the fields required for notification are complete, indicating that the system will send an automatic text and/or email notification upon saving. See job aids for [Digital Exposure Notification for Contacts](#) and [Verifying Case Flow and Notification](#).
- **Most Recent Text Notification Status:** Locked field that shows a snapshot of text notification status as of the time shown in "Status Date." Only updates one time. See [Digital Exposure Notification for Contacts](#) or [Verifying Case Flow and Notification one-pager](#) for descriptions of statuses.
- **Most Recent Notification Status Date:** Locked field for the timestamp of "Text Notification Status." Only updates one time.

- **Send Vaccine or mAb Communication:** Locked field used only by the NC DHHS IT Team to support the text blast functionality. CCTO users cannot use or change this field.
- **Most Recent Vaccine or mAb Communication Text Status:** Locked field that shows a snapshot of text blast status as of the time shown in "Vaccine or mAb Communication Status Date." Updates each time a new text blast is sent.
- **Most Recent Vaccine or mAb Communication Status Date:** Locked field for the timestamp of "Vaccine or mAb Communication Text Status." Updates each time a new text blast is sent.

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Monitoring Event Assessments All Activities Referrals System Information Related

View records below

+ New Assessment Refresh Flow Run Report

Source Monitoring E...	Date	Created On	Local Health...	Assessment...	Agreement	Monitoring...	Quarantine...	Recommen...	When did your symptoms start?	Vomiting	Cough	Muscle Ac...	Chil
Barbara Roberts	9/8/2021	9/8/2021 1:37 PM	Dare	Initial	Yes, I agree to ...	No	---	---	---	No	No	No	No

**15. Assessments Page:** Displays all [assessments](#) (ongoing surveys of changes in symptoms and resource needs) for this contact.

- **+New Assessment Button:** Creates a new [manual assessment](#) for the contact in which results are recorded by the tracer over the phone.

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Monitoring Event Assessments All Activities Referrals System Information Related

+ New Activity Add Existing Activity Refresh

Date Created	Subject	Regarding	Activity Type	Activity Status	Owner	Priority	Start Date	Due Date	Primary Email (O...
9/8/2021 1:13 PM	Public Health Notification	Barbara Roberts	Text Message	Completed	# covid_arias	Normal	9/8/2021 1:13 PM	9/8/2021 1:13 PM	NC-ARIAS-NoReply4
9/8/2021 1:13 PM	Public Health Notification	Barbara Roberts	Email	Completed	# covid_arias	Normal	9/8/2021 1:13 PM	9/8/2021 1:13 PM	NC-ARIAS-NoReply4
9/8/2021 12:30 PM	Follow-up - Elevate	Barbara Roberts	Task	Completed	Mary Moran	Normal	9/10/2021 8:00 AM	9/10/2021 8:00 AM	Mary.K.Moran-EY@c
9/8/2021 12:28 PM	Initial Outreach / Answered	Barbara Roberts	Phone Call	Completed	Mary Moran	Normal	---	---	Mary.K.Moran-EY@c
9/8/2021 12:20 PM	Public Health Notification	Barbara Roberts	Email	Completed	# covid_arias	Normal	9/8/2021 12:20 PM	9/8/2021 12:20 PM	NC-ARIAS-NoReply4

**16. All Activities Page:** Displays copies of all automated outreach (emails, texts) that has been sent to a contact, including items from automatic digital notifications and ongoing digital monitoring.

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Monitoring Event Assessments All Activities Referrals System Information Related

+ New Referral Refresh Flow Run Report

Referra...	Referral Date	Source Monitoring E...	C#	Type of Campaign (...)	Type of Communication	Communication Preferences	Created On	Created By	Agency	Agent Name	Event Coun...
Vaccine	9/8/2021	Barbara Roberts	C-0000994526	Awareness	Outreach Call - Answered	Do not contact in future a...	9/8/2021 1:33 ...	Mary Moran	---	---	---

## 17. Referrals Page: Displays all [referrals](#) created for this individual.

- **+New Referral Button:** Creates a new [referral](#) within the monitoring event using pre-populated information from the individual's monitoring event.

**BR** Barbara Roberts  
Monitoring Event · MDA Form ▾

Monitoring Event Assessments All Activities Referrals **System Information** related

Local Health District Information	
County (Text)	Dare
Region	9
Local Health Department	Dare
State/Province	NC

Record Information	
Modified On	9/8/2021 1:39 PM
Modified By	Mary Moran
Created On	8/20/2021 3:30 PM
Legacy Created By	---
Legacy C#	---
Created By	Mary Moran
Owner	Mary Moran
NC COVID Contact ID	---
Primary Phone (Database Value)	1-234-234-2344
NC COVID Outbreak Number (if applicable)	COVID_____
CORT Use Only	---

Status	
Status	Active
Status Reason	Active
Created From Case Portal	No
Approved to Sync to Person Record?	Yes

System First Outreach Date	
System First Outreach Date	8/20/2021 3:31 PM
System First Outreach Method	Email
Manual First Outreach Date	---
Manual First Outreach Method	---
First Phone Call	---
Most Recent Phone Call	---
Hours To First Phone Call	---

## 18. System Information Page: Displays information about the monitoring event that has been automatically recorded by the system for your reference.

- **System First Outreach Date, Method:** Locked fields that automatically calculate based on the first completed outreach attempt (phone call, text message, or email) in Timeline/Activities.
- **Manual First Outreach Date, Method:** Manual fields that can be used to record the date and method of first outreach attempt for organizations in which this is required. Not generally used.
- **First Phone Call:** Locked field that automatically updates one time based on the first completed phone call, whether or not this is a contact's first outreach.
- **Most Recent Phone Call:** Locked field that automatically updates every time a new phone call is completed.
- **Hours to First Phone Call:** Locked field that automatically calculates the time from monitoring event creation to the time when the first phone call logged on the contact record was closed.
- **NC COVID Contact ID:** Locked field that displays the unique NC COVID ID for contacts who have flowed into CCTO from NC COVID (per [job aid](#)).
- **Outbreak Number (if applicable):** Manual field that may be populated with a contact's NC COVID Outbreak #.

- **CORT Use Only:** Only for use by the COVID-19 Outbreak Response Team.
- **Created From Case Portal:** Locked field that indicates if this contact was created by a case patient [through the case patient portal](#).
- **Approved to Sync to Person Record?:** Manual field that can be used to sync a snapshot of an ME's basic info to a person record if set to "Yes" (per [job aid](#)).





# Case Monitoring Events (MEs)

**Home Town**  
Monitoring Event - MDA Form

Monitoring Event Assessments All Activities Referrals System Information Related

Record Information

C# C-0000994503

Contact or Case Patient **Case**

Person Home Town

Basic Info

Priority Contact or Case ☐ No

First Name \* Home

Middle Name ---

Last Name \* Town

Preferred Name ---

Date of Birth (DOB) \* 1/1/2000

Fake DOB ☐ No

Is Minor ☐ No

Household ---

Household Relationship ---

Requires Proxy ☐ No

Monitoring Details

Enable Digital Monitoring ---

Monitoring Status ---

Monitoring End Date ---

Final Monitoring Outcome ---

Symptom Onset Date 9/5/2021

Last Assessment Date ---

First Date Symptoms Reported ---

Most Recent Date Resource Need Reported ---

**NC COVID Case Patient Info**

NC-COVID Event ID \* 101222332

NC COVID Diagnosis Date \* 9/7/2021

Vaccination

Vaccine - 1st Dose ---

Vaccine Date - 1st Dose ---

Monitoring Event Notes

---

Timeline / Activities

Timeline

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

Case patients are not required to be monitored within CCTO; however, case patient monitoring events (MEs) are used to create digital notifications (per [job aid](#)) and may be used for monitoring if required by local protocol. Almost all fields are shared between case patient MEs and [contact MEs](#). The fields listed below are specific to cases and **are only shown within monitoring events that have "Contact or Case Patient" set to "Case-Patient"** (see left box above). **Note also that case patient MEs do NOT include boxes for Source Case Information or Testing.**

- NC COVID Case Patient Info:** Section appears only if "Case Patient" is selected in "Contact or Case Patient."
  - NC COVID Event ID:** A field for the NC COVID Event ID of this case patient. Flows automatically for cases flowing into CCTO from NC COVID.
  - NC COVID Diagnosis Date:** Field for case patient's NC COVID diagnosis date that locks immediately upon saving. Flows automatically for cases flowing into CCTO From NC COVID.



# Person Records

The screenshot displays the CCTO Person Records interface. On the left, a sidebar contains navigation options: Home, Recent, Pinned, Apps, Dashboards, **People** (highlighted with a red box and a red circle labeled '1'), Monitoring Events, Households, Assessments, Activities, Referrals, Case Portal Submissions, Locations, Events, and Tasks. The main content area is titled 'Sharon Lee - Saved' and includes a dropdown menu for 'Person · Admin Form'. Below the title are tabs: **General** (highlighted with a red box and a red circle labeled '2'), Monitoring Events, System Information, and Related. The 'General' tab shows a form with the following fields:

P#	P-0000008185
Latest Monitoring Event	Sharon Lee
Full Name (Record Label)	Sharon Lee
First Name	Sharon
Middle Name	---
Last Name	Lee
Preferred Name	---
Household	---
Household Relationship	---
Requires Proxy	<input type="checkbox"/> No
Date of Birth (DOB)	3/14/1977
Fake DOB	<input type="checkbox"/> No

Other sections visible include 'Contact Info' (U.S. Primary Phone: 1-000-333-1234, U.S. Phone #2: ---, Country Code: ---, Phone #3: ---, Email: notreal@notreal.com, Preferred Method of Contact: Phone Call, Preferred Language: English), 'Address' (Address Line 1: 123 notreal lane, Address Line 2: ---, City: Jacksonville, State: NC - North Carolina, Postal Code: ---, County: Onslow), and 'COVID-19 Vaccine Information' (Vaccine - 1st Dose: Pfizer-BioNTech (195), Vaccine Date - 1st Dose: 4/15/2021, Vaccine - 1st Dose Confirmed in CVMS?: ☐ No, Vaccine - 2nd Dose: Pfizer-BioNTech (195), Vaccine Date - 2nd Dose: 6/17/2021, Vaccine - 2nd Dose Confirmed in CVMS?: ☐ No).

Each **person record** represents a unique individual who has one or more active or inactive **monitoring event(s) (MEs)** within CCTO. Per [the Person Functionality job aid](#), a person record displays all of the MEs associated with a particular individual and provides a locked snapshot of their basic information.

A new person record is generated when a new ME is created for someone who does not currently exist within CCTO. When new MEs are created for individuals who already exist within CCTO, they are attached to an existing person record. See [job aid](#) for details.

- People Tab:** Displays a person record for each individual who has one or more active or inactive **monitoring event(s)** within CCTO.
- General:** Displays locked information about this person record. *All fields except those listed below are shown as a snapshot from the most recently created ME associated with this person that has the "Approved Sync to Person Record?" field set to "Yes." This happens automatically when an ME is edited or manually created ([see job aid](#)).*

- **P#:** A unique identifier for this person that is automatically generated by the system. This identifier attaches to each monitoring event associated with this person.
- **Latest Monitoring Event:** Locked field with a link to the individual's most recently created [monitoring event](#).
- **Full Name (Record Label):** Locked field displaying the first and last name that were entered on the first ME that created this record. These fields do NOT update with the basic info snapshot and can only be edited by an administrator.

Barbie Roberts  
Person · MDA Form

General **Monitoring Events** System Information Related

Active MEs

+ New Monitoring Event Refresh Flow

✓ C#	Approved to Sy...	Person	Last Name	First Name	Household	Household ...	Primary Ph...	Monitoring...	Preferred la...	Priority Co...	Preferred ...	Is Minor	Is Student	School Na...
C-0000993743	Yes	Barbie Roberts	Roberts	Barbie	---	---	1-234-234-23	---	---	No	Phone Call	No	No	---

Inactive MEs

+ New Monitoring Event Refresh Flow

✓ C#	Approved to Sy...	Person	Last Name	First Name	Household	Household ...	Primary Ph...	Monitoring...	Preferred la...	Priority Co...	Preferred ...	Is Minor	Is Student	School Na...
No data available.														

**3. Monitoring Events Page:** Page within a person record that displays a list of each active and inactive [monitoring event](#) that has been associated with this individual's person record.

- **+New Monitoring Event Button:** Creates a new monitoring event (with pre-populated basic info) for the individual whose person record is selected.



# Household Records

**Brown (Madison Co.)**  
Household

**Summary** | Monitoring Events | System Information | Related

**HOUSEHOLD INFORMATION**

H# H-0000085127

Household Name \* **Brown (Madison Co.)**

Primary Contact Person **Charlie Brown**

**Source Case Info**

NC-COVID Event ID of Source Patient #1 **123456789**

Last Date of Exposure to Source Patient #1 8/20/2021

Ongoing Exposure ☒ Yes

NC-COVID Event ID of Source Patient #2

Last Date of Exposure to Source Patient #2

**Contact Information**

U.S. Primary Phone (will be used for text messages) **1-987-654-3221**

U.S. Phone #2 1-\_\_\_\_-\_\_\_\_

Country Code ---

Phone #3 ---

Email ---

Preferred Method of Contact **Phone Call**

Preferred Language **English**

**ADDRESS**

Street 1 **123 Main St.**

**Monitoring Event Notes**

Primary phone reaches Charlie, guardian, who completes assessments on behalf of Linus and

**Timeline**

Search timeline

Enter a note...

**Phone Call from Mary Moran**  
Daily Monitoring / Answered  
Spoke with Charlie in re: Charlie, Linus, and Lucy...  
Closed 9/8/2021 3:35 PM

A **household** is a joint record that connects a group of monitoring events to help streamline data entry and outreach. Information entered in **Source Case Information**, **Contact Information**, and **Address** will carry over to new contacts created within this household, and this information can also always be adjusted on individual monitoring events later. For more information on navigating households, see [this job aid](#).

## 1. Household Information:

- **H#:** Household number, a unique identifier automatically generated by the system.
- **Household Name:** An identifying group name used for the entire household.
- **Primary Contact Person:** The person record associated with the main individual to whom the contact tracer should speak when contacting this group. This individual may have been designated to complete assessments on behalf of others.

2. **Monitoring Event Notes:** This section serves as a free text box for any reference information that should remain easily visible at the top of the household monitoring event.

3. **Household Timeline:** May be used to log shared activities for household members by following the process [per the job aid](#).

← Save Save & Close + New Open Org Chart Deactivate Connect Assign Email a Link Delete Refresh Check Access Process Share Flow

**B( Brown (Madison Co.)**  
Household

Summary **Monitoring Events** System Information Related

Active MEs **3** + New Monitoring Event Refresh Flow

✓ C#	Approved to Sy...	Person	Last Name	First Name	Household	Household ...	Primary Ph...	Monitoring...	Preferred la...	Priority Co...	Preferred ...	Is Minor	Is Student	School Na...
C-0000993933	Yes	Lucy Brown	Brown	Lucy	Brown (Madiso	---	1-987-654-32	---	---	No	Phone Call	No	Yes	Birchwood...
C-0000993932	Yes	Linus Brown	Brown	Linus	Brown (Madiso	---	1-987-654-32	---	---	No	Phone Call	No	Yes	Birchwood...
C-0000993931	Yes	Charlie Brown	Brown	Charlie	Brown (Madiso	---	1-987-654-32	---	---	No	Phone Call	No	Yes	Birchwood...

Inactive MEs + New Monitoring Event Refresh Flow

No data available.

3. **Monitoring Events Page:** Lists all active and inactive monitoring events within a household. Each individual within a household must have their own monitoring event and assessments.
- **+New Monitoring Event Button:** Creates a new ME within the household using pre-populated information from the household record.



The screenshot shows a web-based assessment form titled 'A-0000466804 Assessment'. The form is divided into several sections, with four specific areas highlighted by red boxes and numbered callouts:

- 1. Details:** This section includes fields for 'Assessment Type' (set to 'Initial'), 'Agreement' (set to 'Yes, I agree to participate.'), and 'Agreement/Disagreement Date' (set to '1/6/2021').
- 2. Covid-19 Test Results:** This section includes fields for 'Have you received a Covid-19 test result?' (set to 'Yes'), 'Test Date' (set to '1/11/2021'), 'Test Location' (set to 'Walgreens'), and 'Test Results' (set to 'Positive').
- 3. Symptoms:** This section is a table listing various symptoms and their status. The symptoms listed are: Fever (No), Highest temperature in the past 24 hours (---), Sweats (No), Chills (No), Headache (Yes), Muscle Aches (Yes), Sore Throat (Yes), Cough (Yes), Loss of Smell or Taste (No), Shortness of Breath/Difficulty Breathing (Yes), Stomach Pain or Cramps (No), Vomiting (No), Diarrhea (No), and Other Symptoms (---). The 'When did your symptoms start?' field is set to '1/8/2021'.
- 4. Additional Questions:** This section includes questions about access to a phone or computer, face covering, ability to remain in home without guests, ability to isolate, household members at high risk, someone that could run errands, primary care provider, other resource needs, and any other information to provide.

An **assessment** is an ongoing survey of changes in symptoms and resource needs. These could be completed by the contact in a **digital assessment** (delivered to a contact via text or email) or recorded by the tracer in a **manual assessment** (completed by the tracer while speaking to the contact on the phone). See the [Assessments Job Aid](#) for details.

### 1. Details:

- **Assessment Type:** Indicates if this is an initial, monitoring, or notification assessment. Notification assessments are sent within automatic digital notifications and contain a unique set of information (see [next page](#)). Both initial and monitoring assessments collect the same symptom and test result information; however, initial assessments display a full list of resource need questions, while monitoring assessments ask contacts: "Do you have a new resource need?" and only request more info if contacts respond "Yes."
- **Agreement:** Indicates whether the contact has agreed to participate and is used to calculate "Last Assessment Date."
- **Agreement/Disagreement Date:** Locked field that automatically populates based upon the first date that "Agreement" field is populated.

2. **Covid-19 Test Results:** Allows the contact to self-report testing information that will automatically transfer to the [Contact Reported Testing](#) box on a monitoring event.

3. **Symptoms:** Corresponds with the symptom questions presented to contacts in digital assessments. The first time any field in this section except "Other Symptoms" or "Highest temperature in the past 24 hours" is completed, the monitoring event field for "First Date Symptoms Reported" will update.
4. **Additional Questions:** Corresponds with the resource need questions presented to contacts in digital assessments and will present a shortened list of questions if "Assessment Type" is "Monitoring." Each time any field in this section except "Is there any other information you would like to provide?" is updated, the monitoring event field for "Most Recent Date Resource Need Reported" will update.

A-0000483174 **5**  
Assessment

Assessment **Notification Contact Info** Suggested Exposures System Information Related

<p><b>Contact Provided Information</b></p> <p>🔒 First Name Gandalf</p> <p>Middle Name MiddleName</p> <p>🔒 Last Name the Grey</p> <p>🔒 Date of Birth (DOB) 12/31/2000</p> <p>🔒 Primary Phone Number ---</p> <p>🔒 Email Gandalf@wizard.com</p> <p>🔒 Preferred Language English</p>	<p><b>Original Contact Information</b></p> <p>🔒 First Name Gandalf 21</p> <p>Middle Name 21</p> <p>🔒 Last Name the Grey</p> <p>🔒 Date of Birth (DOB) 12/31/2000</p> <p>🔒 Primary Phone Number 1-984-444-7587</p> <p>🔒 Email george.r.joyner@dhhs.nc.gov</p> <p>🔒 Preferred Language ---</p>	<p>🔒 Preferred Method of Contact Email</p> <p>🔒 Contact Updated? Yes</p> <p>🔒 Quarantine end date 1/29/2021</p> <p>🔒 Recommended Test Date 1/20/2021</p> <p>Reviewed &amp; wrong person No</p>
<p><b>Contact Provided Address</b></p> <p>🔒 Address Line 1 123 Middle St</p> <p>🔒 Address Line 2 ---</p> <p>🔒 City Middle Earth</p> <p>🔒 County Rockingham</p>	<p><b>Original Address Information</b></p> <p>🔒 Address Line 1 ---</p> <p>🔒 Address Line 2 ---</p> <p>🔒 City ---</p> <p>🔒 County Rockingham</p>	

5. **Notification Contact Info:** For notification assessments only, shows the information submitted by a contact through the notification portal. Will be blank on monitoring and initial assessments. See the [Digital Exposure Notification job aid](#) for more information.
  - **Contact Provided Info, Address, Demographics:** Locked fields that show contact's submitted responses within the digital exposure notification portal.
  - **Original Contact Info, Address, Demographics:** Locked fields that show the original data in contact's monitoring event prior to contact's submitted responses in the portal.
  - **Contact Updated?:** Locked field that reads "Yes" if contact-provided last name and original last name are an exact match, indicating that all contact-provided responses have transferred automatically onto monitoring event. *In the event of a mismatch, see page 5 of the [job aid](#).*



- **Quarantine End Date:** Locked field that displays the quarantine end date sent to the contact in their automatic notification (based on [“Last Date of Exposure”](#)).
- **Recommended Test Date:** Locked field that displays the recommended test date sent to the contact in their automatic notification (based on [“Last Date of Exposure”](#)).
- **Reviewed & Wrong Person:** Manual field that can be updated to “Yes” per local process if it is determined a notification was received by someone other than the intended contact.



← Save Save & Close + New Deactivate Delete Refresh Check Access Assign Share Email a Link Flow Run Report

R-0000001333  
Referral

General Related

Basic Info

Owner \* Mary Moran

Created By Mary Moran

R# R-0000001333

Source Monitoring Event \* Lucy Brown

Details

Referral Type \* Resource

Referral Date \* 9/8/2021

Details

Type of Communication Resource Specific Outreach Call (answered)

Type of Campaign Specific Need

Referral Need Food Assistance

Outcome of Referral (if known) Connected with CHW (if applicable)

Communication Preferences Prefers only texts about resources

Notes from Referral Connected individual with CHW associated with food bank.

Referred To:

Agency CHW

Agent Name Snoopy Dog

How Referred Transferred to person (warm transfer)

**Referrals** are a type of record connected to monitoring events and used as part of the documentation process for vaccine, resource, and other referral conversations. A referral is not a replacement for a phone call being logged in Timeline/Activities, and it should be logged in addition to the phone call that took place. For more details and guidance regarding referrals, please review the [Documenting a Referral](#) job aid.

1. **Basic Info:** This box is included on all three referral types.

- **Owner:** Field automatically populated with the user who created this referral; can be manually edited.
- **Created By:** Locked field for the user who created this referral.
- **R#:** A unique identifier that populates upon saving.
- **Source Monitoring Event:** Locked field that automatically populates with the ME for which this referral is being logged.

2. **Details:** This box on the left side is included on all three referral types.

- **Referral Type:** This field can be selected to "Vaccine," "Resource," or "Other" and indicates which category of referral is being logged. Each option will produce unique fields pertaining specifically to each individual referral type, and selecting "Other" will produce a free text field for more information about this referral type.
- **Referral Date:** Automatically populates based upon the time the referral was created.

3. **Details (Resource Referral):** This box is specific to each referral type. See the [Quick Reference: Referrals Job Aid](#) for assistance in selecting the options in each field. For referrals in which “Referral Type” is set to “Resource”:
- **Type of Communication:** Indicates what type of call is being made or received.
  - **Type of Campaign:** Appears only if an outreach call option is selected in “Type of Communication.” Indicates the context of the referral.
  - **Referral Need:** Appears only if “Resource” is selected in “Referral Type” to indicate more detail about the type of resource requested.
  - **Outcome of Referral:** Indicates the final status of the referral.
  - **Communication Preferences:** Indicates how the individual would like to be contacted regarding resources.
  - **Notes from Referral:** This section serves as a free text box for any information regarding the referral that should remain easily visible.
4. **Referred To (Resource Referral):** See the [Quick Reference: Referrals Job Aid](#) for assistance in selecting the options in each field. This box appears only if “Resource” is selected as the referral type, along with the following fields:
- **Agency:** Indicates the type of organization to which the individual has been referred. Selecting “Local Resource” will produce a free text field for the name of the local resource.
  - **Agent Name:** A free text field that indicates the name of the individual to whom this case or contact has been referred.
  - **How Referred:** Lists the process used for the referral. Selecting “Other” will produce a free text field.


← ↻ Save 🖨️ Save & Close + New ⌵ Flow ▾

New Referral - Unsaved

General

Basic Info

Owner

\*  Mary Moran


Created By

---

R#

---

Source Monitoring Event


\*  Barbara Roberts

Details

Referral Type

\* Vaccine

Referral Date

\* 11/3/2021 

Details

Type of Communication

Vaccine Specific Outreach Call (answered)

Type of Campaign

Awareness

Person Current Vaccination Status

Person Not Vaccinated and Not Scheduled for Vaccine

Reason Why Not Vaccinated

Person opposed to Covid vaccine

Hesitancy Reason

Still Researching/ Deciding

Outcome of Referral (if known)

General Information Provided

Communication Preferences

Do not contact in future about vaccines

Notes from Referral

Individual prefers not to discuss this decision and has requested that we do not follow up as she conducts her own research. Provided links via email and phone number to NC COVID-19 Vaccine Help Center at 888-675-4567.

5. **Details (Vaccine Referral):** This box is specific to each referral type. See the [Quick Reference: Referrals Job Aid](#) for assistance in selecting the options in each field. For referrals in which “Referral Type” is set to “Vaccine”:

- **Type of Communication:** Indicates what type of call is being made.
- **Type of Campaign:** Appears only if an outreach call option is selected in “Type of Communication.” Indicates the context of the referral.
- **Person Current Vaccination Status:** Appears only if “Vaccine” is selected in “Referral Type” to indicate the vaccination status of the individual being referred.
- **Reason Why Not Vaccinated:** Appears only if “Person Not Vaccinated and Not Scheduled for Vaccine” is selected in “Person Current Vaccination Status” to indicate the reason that this individual is not vaccinated.
- **Hesitancy Reason:** Appears only if “Person opposed to COVID vaccine” is selected in “Reason Why Not Vaccinated” to provide more information about the individual’s hesitancy. See the [Quick Reference: Referrals Job Aid](#) for assistance in selecting these options.
- **Outcome of Referral:** Indicates the final status of the referral.
- **Communication Preferences:** Indicates how the individual would like to be contacted. For vaccine referrals, field will also update the [“Vaccine Communication Preference”](#) field in the individual’s monitoring event. The monitoring event field can also be updated manually but will automatically update each time a referral with a new preference is logged.
- **Notes from Referral:** This section serves as a free text box for any information regarding the referral that should remain easily visible.



# Case Portal Submissions

E-0000001480 - Saved  
Case Portal Submission

Exposure Related

3 Updated Info for Monitoring Event Creation

First Name \* Phil

Last Name \* Future

Exposure Date \* 11/30/2021

Phone Number \* 1-333-444-3434

Email \* phil@future.com

Additional Info Met with Phil for brunch on Tuesday.

Contact Monitoring Event Created? ☐ No

Create Monitoring Event ☒ Yes

1 Original Information from Case Portal

First Name \* Phil

Last Name \* Future

Exposure Date \* 11/30/2022

Phone Number \* 1-333-444-3434

Email \* phil@future.com

Additional Info Met with Phil for brunch on Tuesday.

2 Source Case

Source Case-Patient \* ☒ Parking Lot

NC COVID Diagnosis Date 11/30/2021

Reported No Symptoms No

Symptom Onset Date 11/30/2021

4 Case Portal Submission Notes

---

**Case portal submissions** are a type of record documenting the close contact submissions made by case patients using the portal. All information regarding any contacts submitted by the case patient through the portal is stored within CCTO as a submission record whether or not the submission becomes a contact monitoring event. See the *criteria for automatic contact ME creation and the steps for manual ME creation* in the [Understanding the Case Patient Portal job aid](#).

- Original Information from Case Portal:** Locked fields documenting info about this potential close contact as it was submitted by the case.
- Source Case:** Locked fields documenting information about this case patient.
  - Source Case-Patient Monitoring Event:** Monitoring event for the case patient who accessed the portal to submit this potential close contact.
  - NC COVID Diagnosis Date:** Diagnosis date for the case patient who accessed the portal to submit this potential close contact.
  - Reported No Symptoms:** Reads "Yes" if the case patient who submitted this contact selected "I have not had any COVID-19 symptoms" in the portal.
  - Symptom Onset Date:** Indicates the date of symptom onset reported by the case patient who submitted this contact (if applicable).

3. **Updated Info for Monitoring Event Creation:** Fields displaying the information that has been or will be pulled onto a contact ME created from this submission. By default, each field will be a copy of the *Original Information* box, and these fields will be editable if a submission is active and requires manual review. See [job aid](#) for more information on using these fields.
- **Contact Monitoring Event Created?:** Locked toggle indicating whether this submission has already been created as a contact monitoring event.
  - **Created Contact Monitoring Event:** Name of the contact monitoring event created by this submission (if applicable).
  - **Create Monitoring Event:** Manual toggle to create a contact monitoring event from this submission. Only unlocked if a submission has *not* already been automatically created as a monitoring event. Locks upon first use so that only one monitoring event can be created per submission.
  - **Additional Info:** Locked field for any additional information submitted by a case patient about this individual.
4. **Case Portal Submission Notes:** Manual field for any notes the CI/CT would like to record about this case portal submission. Flows onto contact ME if one is created from this submission.